

Lesson 28: Payments

Does Vanessa qualify for any additional credits?

At this point during the interview, you will need to discuss and verify all the items on Vanessa's Form 13614-C that may affect a potential credit or payment she is entitled to receive.

Refer to Publication 4012 (Tab 6), Other Taxes and Payments section, to identify and review the Payments section of the return.

Vanessa checked "No" on Form 13614-C, Part V, item 9, regarding estimated tax payments. Let's see if there are other payments Vanessa made during the year and if she will qualify for any additional credits that will reduce her tax liability. Her Form W-2 reveals her tax withholding.

Sample Interview Clarifying Payments

SAMPLE INTERVIEW	
VOLUNTEER SAYS...	VANESSA RESPONDS...
<i>Vanessa, based on your intake and interview sheet, you stated that you did not purchase a home in 2011.</i>	Yes, that's correct.
<i>I know you had a little self-employment income, and you did indicate on your intake and interview sheet that you did not make any estimated tax payments, but I still need to verify if this is correct.</i>	Right, again.
<i>Looking at your self-employment income and your last year's return, you probably weren't required to pay any.</i>	That's a relief!
<i>You also have your withholding from your W-2, which will be included in the payments section.</i>	Okay.
<i>We're not finished yet. Bella, Zoe, and Zachary may qualify you for the earned income credit. The EIC may increase your refund or decrease your tax liability.</i>	That's great!



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